

The Pacific Tourism Data Initiative: exploring impacts, indicators and outcomes

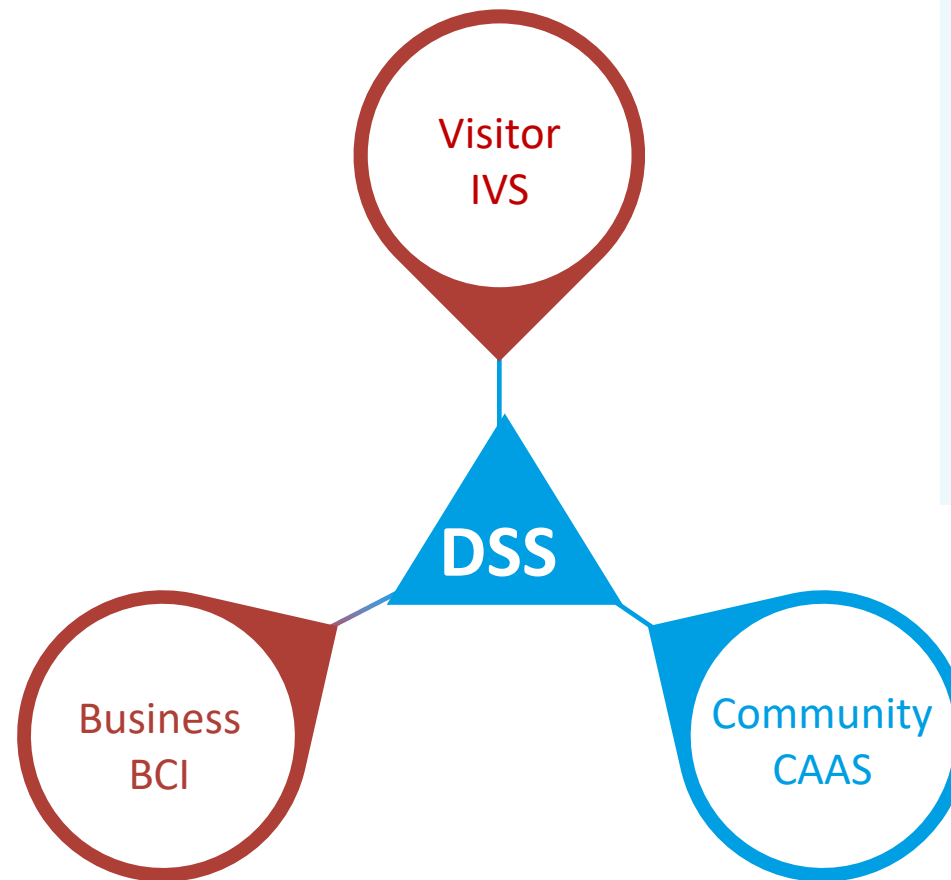


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Three research pillars of the PTDI



Tourism Decision Support System (DSS)

Supports and learns from other vital research activity: ecosystem, environmental, economic etc

Translating data into evidence based approaches to policy and strategy

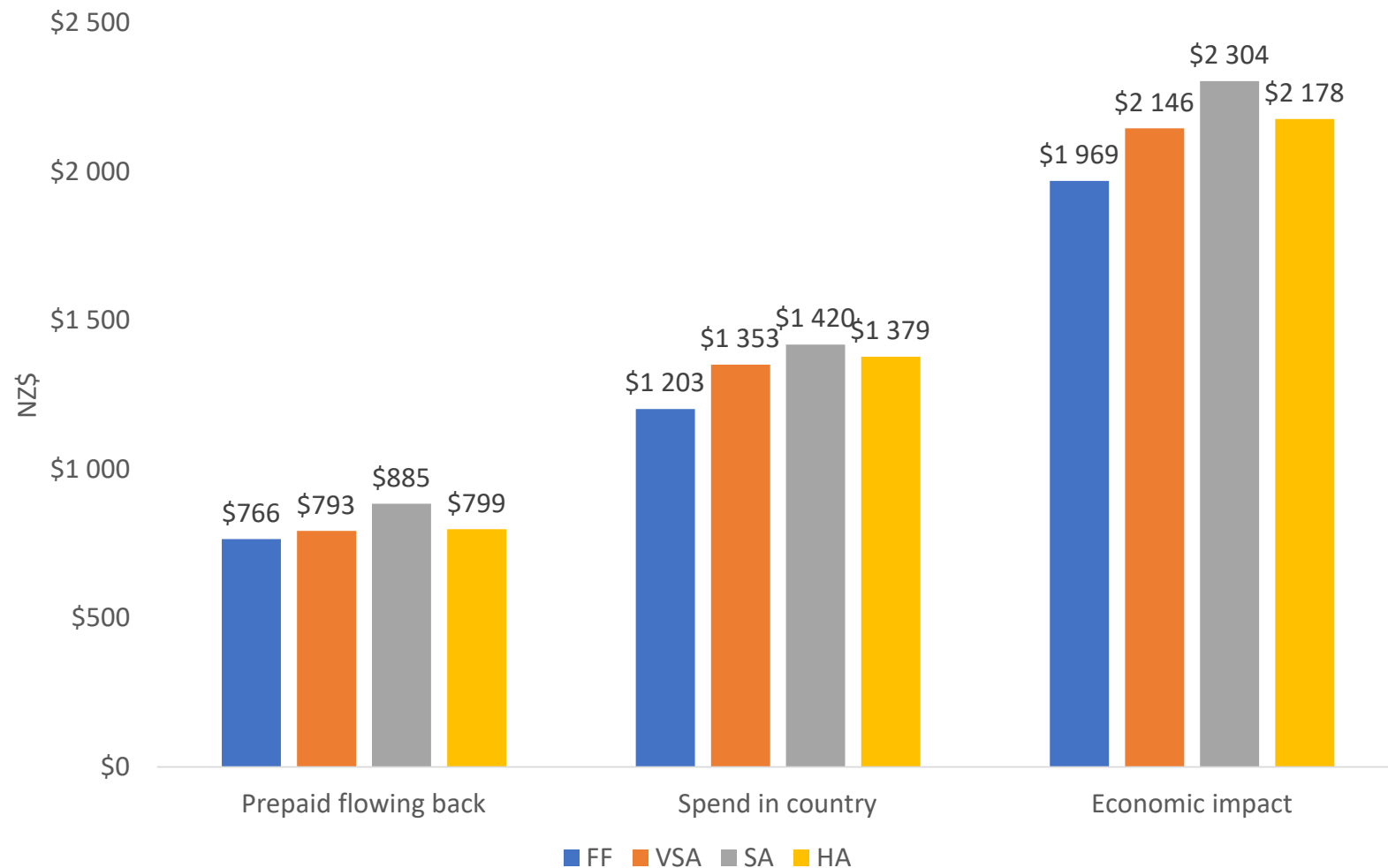
- Understanding impacts and developing indicators that can inform more sustainable approaches to tourism development
- Examples of evidence based approaches to:
 - ✓ develop marketing and product development strategies
 - ✓ support investment decision making and impact evaluation
 - ✓ understand impacts of infrastructure investment
 - ✓ monitor environmental performance ('citizen' science)
 - ✓ responding to labour market challenges

A large sea turtle with a patterned shell is swimming in clear blue water. A scuba diver in a black wetsuit is visible in the background, partially obscured by the turtle's shell. The diver is holding a camera or light. The scene is set underwater, with a coral reef visible at the bottom.

Target the 'Right' Visitor: from fly and flop to soft adventure

Cook Islands IVS Soft Adventure Visitor Segmentation
(2016-2019)

Soft adventure visitors spending per visit (2016-2019)



BLUE ECONOMY

Marine Ecosystem Services Valuation

Total spend (2019/20) by number of marine activity types undertaken

	2 and less	3-5 types	6 and MORE
Average length of stay (nights)	8.1	8.5	9.4
Prepaid spend flowing back to local economy (NZ\$)	685	829	918
Local spend per visitor (NZ\$)	1272	1276	1576
Total economic impact per visitor (NZ\$)	1956	2105	2494

(Source: Cook Islands IVS)

Flight underwrites: money well spent



- Value of direct LAX route (yield rather than Cost of Acquisition)
- Underwrite as investment
- Critical source of competitive advantage

Investment

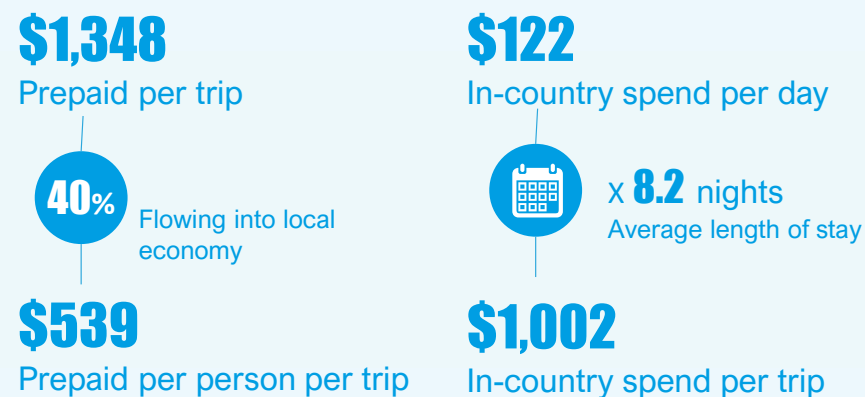
Island Experiences IN THE South Pacific



NIUE IVS 2017-2020

NZ NON-DIVER

NZ DIVER



Note: NZ dollars in the chart.

Some key quotes from Niue divers – focus on experience

“The weather caused nearly all my diving and whale watching trips to be cancelled. While I appreciate nobody can control the weather, I was left a little disappointed that there were no indoor activities around and was basically told by resort staff to “just stay inside your room and read a book”. That is not why I go on holidays! ”

“Our dive people were confronted by a local woman who was very hostile and not keen to allow the boat to be launched. This was the only available ramp and the inconvenience to the fishermen was very small equating to minutes only. We had to miss 2 dives because of the locals attitude to our use of the launching ramp.”

“The information from the IVS not only backs up our on the ground experiences but also gives us real insights into the broader value of the dive sector to Niue – it also shows where we need to work together to do better!”

Communication from NZ based Niue Dive investor

Infrastructure



2019 VISITORS TO MUNDA



COUNTRY OF ORIGIN

53%
AUS

16%
US

16%
EUR

8%
NZ

8%
OTHER



PURPOSE OF VISIT

61%
Holiday

14%
VFR

11%
Volunteering

7%
Business

11%
Other



81%
Tertiary education



\$80,166
Avg. household income



96%
Willing to return



98%
Willing to recommend

ACTIVITIES PARTICIPATION



83%
Snorkelling



61%
Diving



28%
Culture events
/ festivals



33%
Culture tours



PREPAID EXPENDITURE

\$1,208 per trip
Flowing back rate 60%



IN-COUNTRY SPEND

\$30 per day



X **11.5** nights
Average length of stay

\$345 per trip



TOTAL ECONOMIC IMPACT

\$1,553 per trip

The Water visibility was incredible, with the most spectacular snorkelling. I tried diving for the first time on this trip and I loved it! The reefs are pristine and the number of species

I don't want the experience totally packaged for me. it is unclear whether villagers are being exploited by tour and dive guides. it doesn't seem like the villagers are seeing monetary benefit of visitors, perhaps the guides are keeping all of the income and not sharing it with the people whose way of life has ensured a level of conservation and diversity that is unmatched.

Apia Waterfront Redevelopment Project: 2019 >>>



Did you visit the Apia waterfront area?



[Map source: <https://corporate.southpacificislands.travel/wp-content/uploads/2017/10/Apia-Waterfront-Project.jpg>]

- ☐ Yes
☐ No

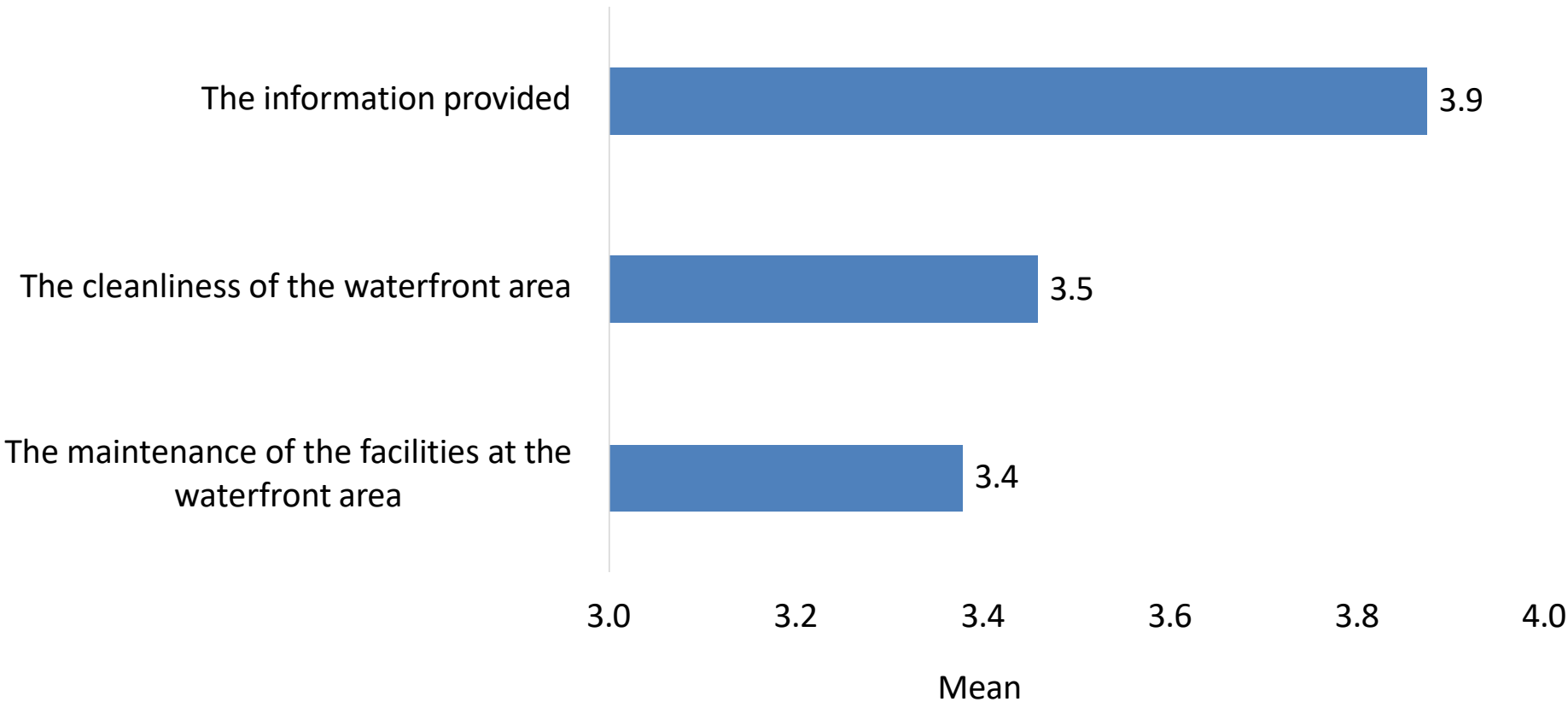
Did you spend time walking around the Apia waterfront area?

- ☐ Yes
☐ No

In 2019 65% of international visitors spend time in Apia. Of this group (90%) stated they had visited the Apia Waterfront area.

Satellite survey gathers additional information as baseline.

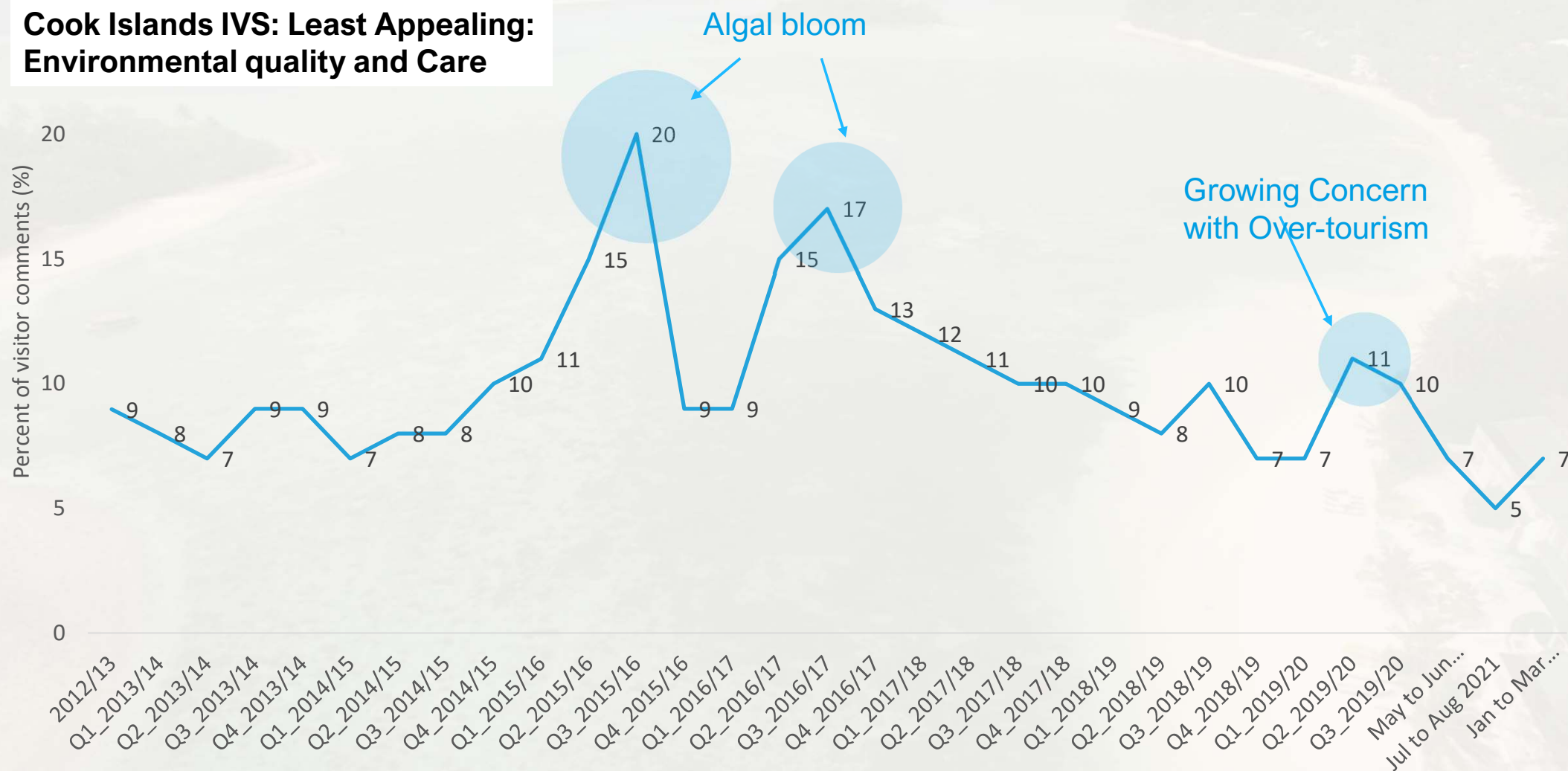
For all Waterfront Visitors: Degree of Satisfaction with...



Note: "The information provided" only covers participants who saw either maps/directions, or historical/heritage information.

CLIMATE CHANGE, NATURAL DISASTERS, ENVIRONMENTAL DEGRADATION

**Cook Islands IVS: Least Appealing:
Environmental quality and Care**



Damaging a sense of belonging (and economic impact)

The Algae Sensitive Visitor (73%) were almost twice as likely to be repeat visitors than the Average Visitor (42%), higher income and higher spend.

"We have been visiting the Cooks for 30 years and were upset this recent visit by the general increase in rubbish and deterioration of facilities. Also we have real concerns about the water quality of the lagoon, especially at Muri Beach."

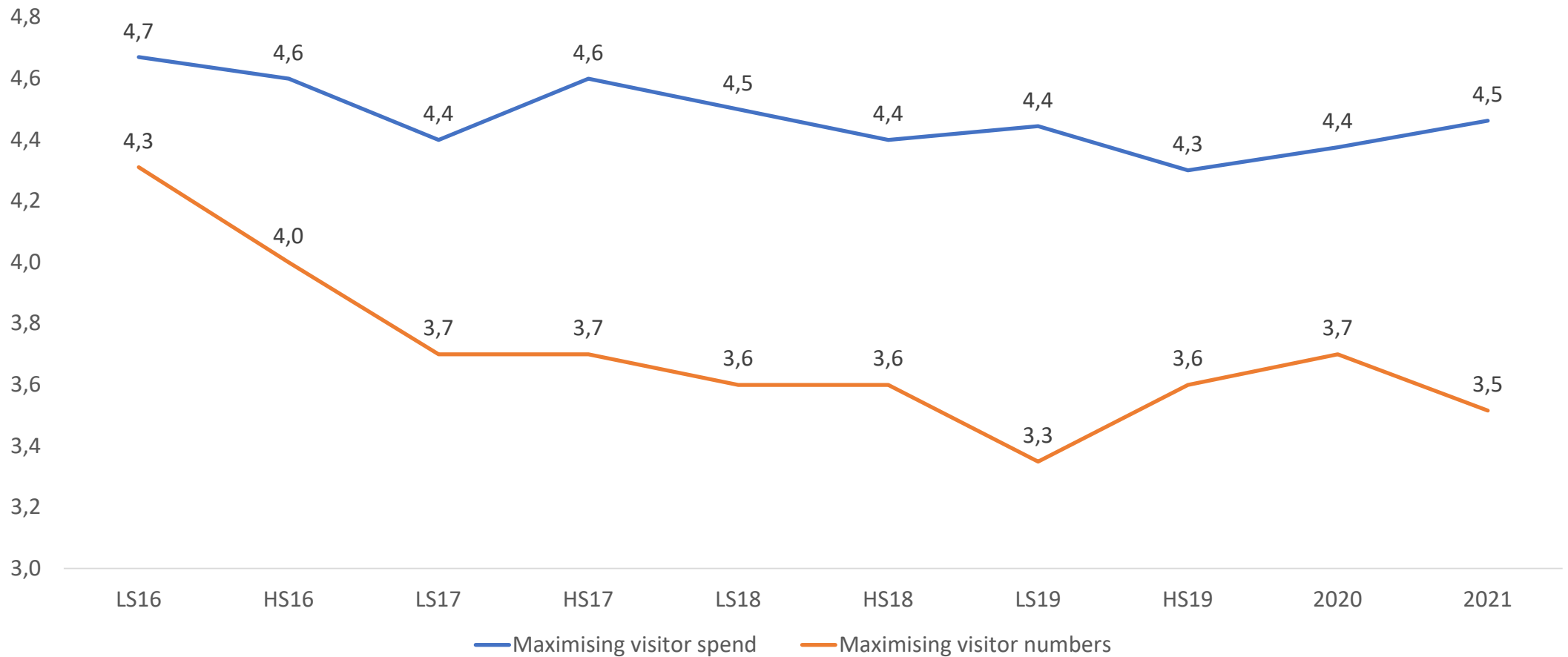
"This was our 6th time and we were devastated to see the algae in the Muri lagoon and the mess on the beach....We came to Rarotonga for the lagoon so would have not spent 27 hours travelling to get there if we had know what had happened to it. We hope that it can get cleaned up and back to the paradise we once knew. We will not return until the problem is fixed."

Least Appealing Aspect of Visit - Environmental Quality 2018/19 Regional Comparison

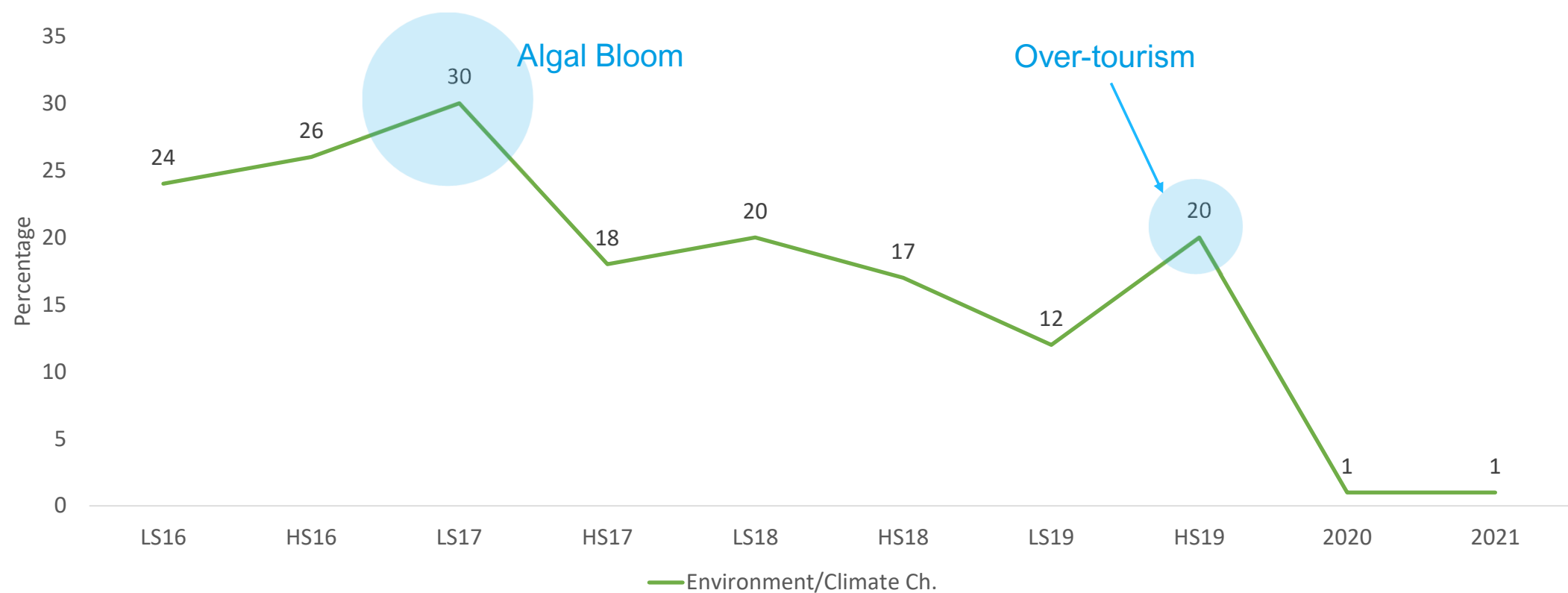
Country	% of visitor comments
Yap	3
Niue	4
Cook Is.	8
Samoa	11
Vanuatu	15
PNG	18
Solomon Is	35

Cook Islands BCI:

How important are the following to the Cook Islands?



What do you see as being the major challenges that will face your business in next five years?

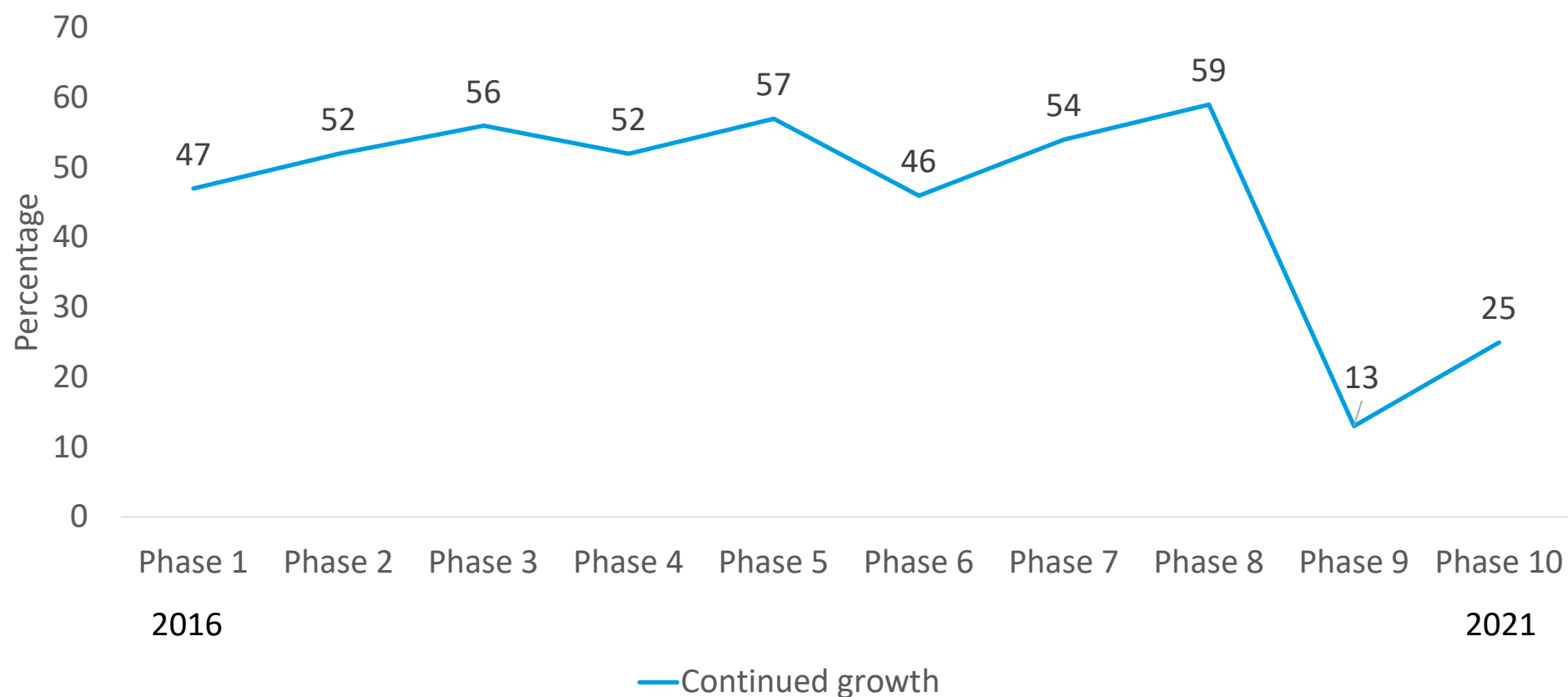


A photograph of a window with a 'HELP WANTED' sign taped to it. The sign is black with white text. The words 'Labour shortage' are overlaid in white text on the left side of the image.

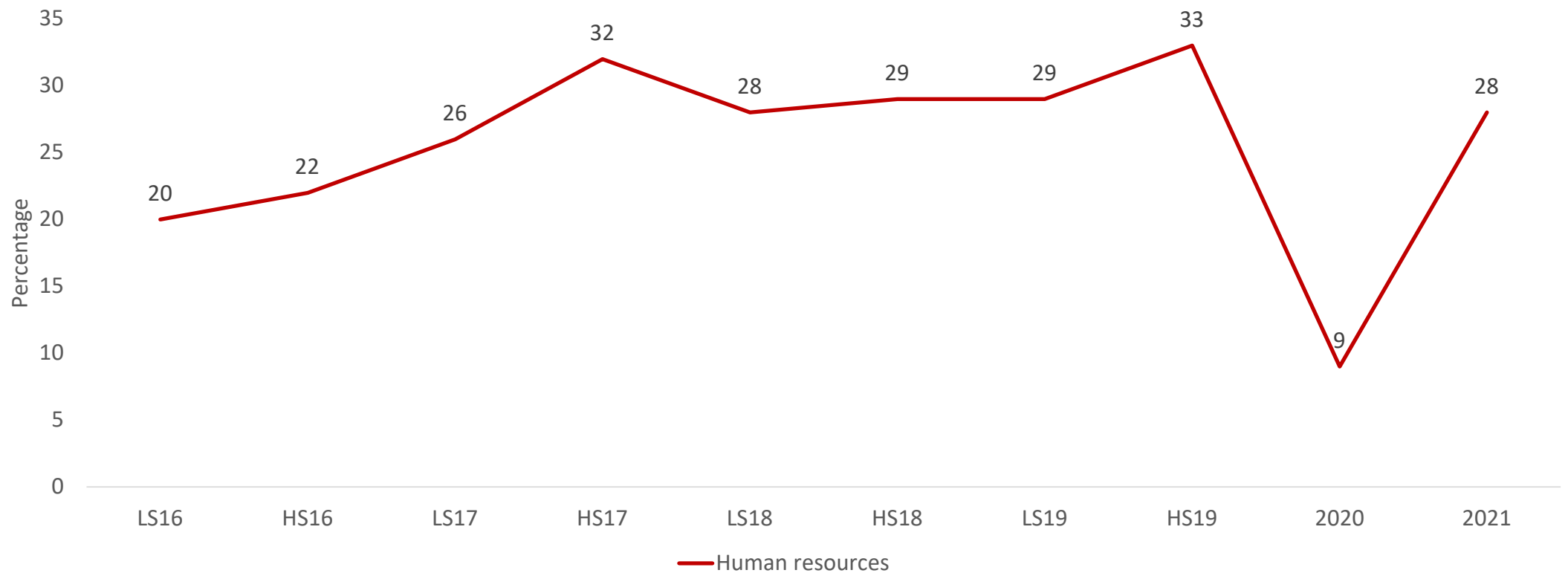
**Labour
shortage**

Labour
Shortages

Cook Islands: How do you see your business evolving in the next five years? (BCI 2016-2021)



What do you see as being the major challenges that will face your business in next five years?



Key Takeaways

- **The visitor:** short term boost in higher yield visitors – but how do we sustain this? Look to shift from fly and flop and to increase engagement with the cultural/community dimensions of the visitor experience. Focus on higher value long haul visitors in the future.
- **Private investment:** needs to be increasingly guided by and evaluated against indicators that are backed by a strong evidence base. A focus on sustainability/resilience and access to robust, timely information is critical.
- **Infrastructure:** critical needs exist throughout the region. Must factor in present and future tourism needs and demands. DSS can provide vital insights to guide and measure impacts and outcomes.

Key Takeaways

- **Environment:** critical to move on the pathway to lower carbon and more sustainable tourism industries. Vital to factor in and mitigate GCC impacts through strategy, design and development. Visitors and community are important 'citizen scientists' – cost effective barometers of change are vital. Environmental concerns will remain as a factor but will need to be reinforced with business as other challenges are prioritized.
- **Business:** labour will be a critical limiting factor as industries recover. A heightened focus on training and also enhanced movement of labour across national boundaries is vital.

Community: must be a focus. A critical missing link in Pacific tourism datasets.

Ngā mihi

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